



## Kentucky Department of Veterans Affairs

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### Veterans Must File Tax Return to Receive Stimulus Payment

FRANKFORT, KY – March 24, 2008 – The Kentucky Department of Veterans Affairs (KDVA) urges veterans and their families to file federal tax returns to ensure they qualify for economic stimulus checks of at least \$300 this year.

“If you know a veteran,” said KDVA Commissioner Les Beavers, Brigadier General (Ret.), “please give them this information about making sure they qualify for the economic stimulus payment.”

Those veterans who would not ordinarily file a federal tax return must do so in order to receive the federal stimulus payments that will begin in May.

Most people will not have to do anything other than file their 2007 individual income tax return to receive their stimulus payment.

But retired members of the military, who don’t have a requirement to file a tax return, need to be aware that the only way they can get a stimulus payment is to file a return.

Even those who have little or no tax liability may qualify for a minimum payment of \$300 (\$600 if filing a joint return) if their tax return reflects \$3,000 or more in qualifying income.

Veterans should also be aware that special rules apply to help them qualify. For the purpose of the stimulus payments, qualifying income includes veterans’ disability compensation, pension or survivors’ benefits received from the Department of Veterans Affairs in 2007.

The attached flyer answers basic questions about veterans and the stimulus payments, and explains how to get more information.

## Did you receive disability compensation, pension or survivors' benefits from the Department of Veterans Affairs last year?

Even if you are not otherwise required to file a tax return, you may still be entitled to an economic stimulus payment from the federal government.

**WHAT YOU COULD GET:** You could receive a payment of \$300 for individuals or \$600 if you are married and file a joint tax return with your spouse. Eligible taxpayers who qualify for a payment may receive an additional \$300 for each qualifying child. To qualify a child must be under age 17 as of December 31, 2007.

**WHAT YOU NEED TO DO:** All you have to do to get the stimulus payment is file a 2007 IRS Form 1040 or Form 1040A and report at least \$3,000 in qualifying income on the form. You can include the amount of your VA benefits to qualify for the stimulus payment.

**QUALIFYING INCOME:** Add the amount of your VA disability compensation, pension, or survivors' benefits to any other qualifying income you have to reach the \$3,000 requirement. Other qualifying income would include wage earnings or Social Security benefits.

**WHAT YOU FILL OUT:** Enter your name, address, Social Security Number, and filing status on the form. Then just enter the amount of VA and Social Security benefits you received on line 14a of the Form 1040A or line 20a of Form 1040. You can estimate the benefits you receive from VA or the Social Security Administration by taking the monthly amount you received last year and multiplying it by the number of months you received payments. If you need to include wage earnings to reach the \$3,000 qualifying level, enter that amount on Line 7 of Form 1040A or 1040. In addition, you should write the words "Stimulus Payment" at the top of the 1040A or 1040.

**IS THE STIMULUS PAYMENT TAXABLE NEXT YEAR?** No!

**WILL THIS PAYMENT AFFECT THE AMOUNT OF VA BENEFITS YOU RECEIVE?** No!

**WHEN WILL I RECEIVE MY PAYMENT?** For those who file a 2007 tax return, IRS will begin mailing checks in May.

**FOR MORE INFORMATION:** In late March 2008, the IRS will mail a packet of information to recipients of VA benefits who did not file a tax return last year. The packet will contain guidance to help you claim the stimulus payment. If you need information in the interim, you can visit the IRS web site at [www.irs.gov](http://www.irs.gov).